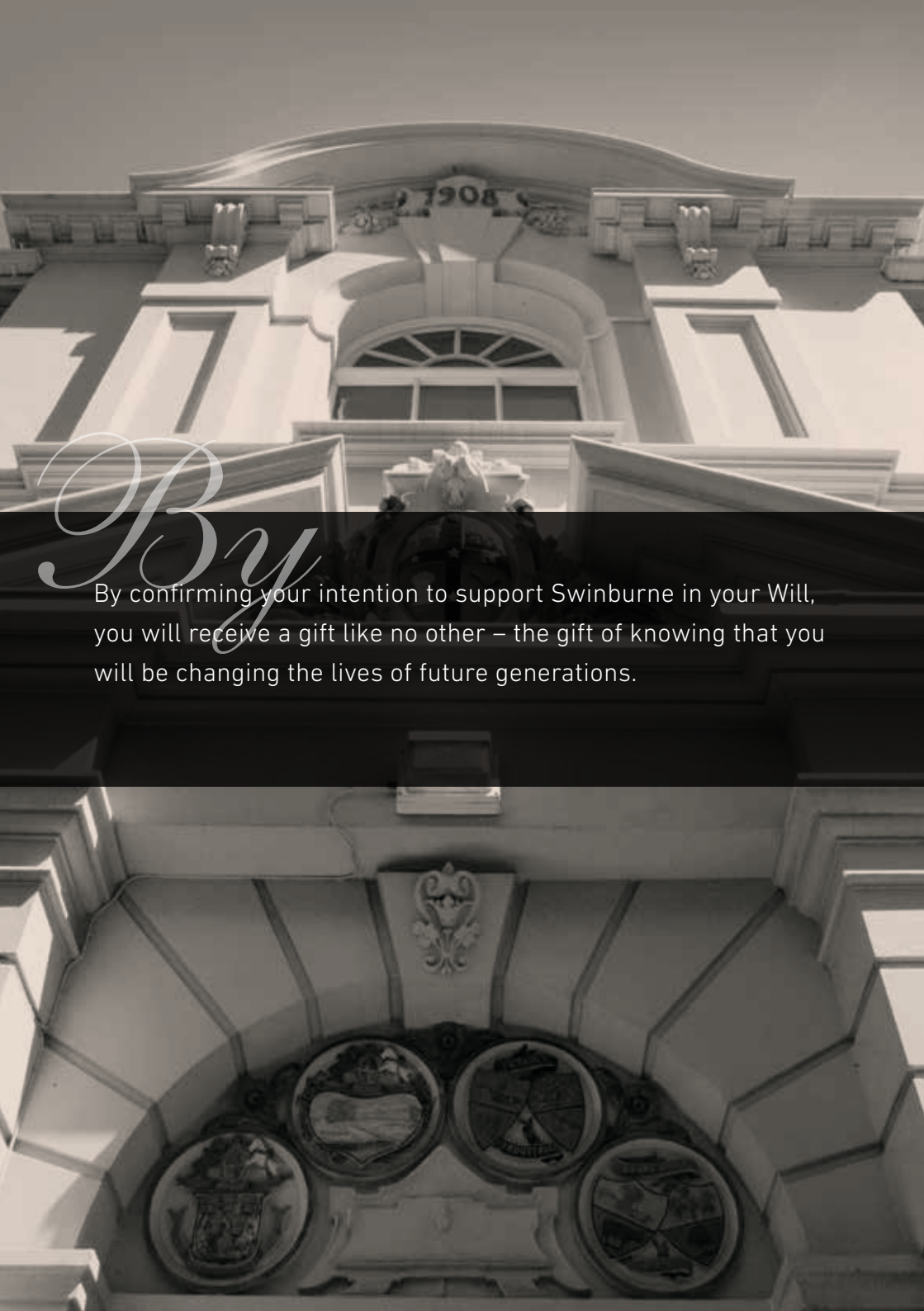


A portrait of a woman with dark, curly hair, wearing a dark top and a pearl necklace. The background is a dark, textured brown.

Planned Giving



MAKING A BEQUEST TO SWINBURNE



By

By confirming your intention to support Swinburne in your Will, you will receive a gift like no other – the gift of knowing that you will be changing the lives of future generations.

Ethel Swinburne

HER GENEROSITY TRANSFORMED SWINBURNE

The genesis of the establishment of Swinburne came from the vision and financial generosity of George and Ethel Swinburne. In 1908, they each donated £1,000 (approximately \$500,000 in today's values) "towards the establishment of a local technical college for the Eastern suburbs" (The Herald, 22 June 1907).

The Swinburnes together, but also Ethel individually, continued to donate significant amounts to the institution throughout their lives. These gifts enabled the (then) College to purchase additional real estate along Burwood Road, Hawthorn, acquire furniture and fittings, fund student prizes, provide financial assistance for staff travel to the UK and contribute towards the College Chaplain's salary. Ethel regularly hosted garden parties for staff and their partners at the Swinburne home in Kinkora Road, Hawthorn. Throughout her life, Swinburne was uppermost in Ethel's mind. Upon her passing in 1960, Swinburne continued to benefit from her generosity via a significant bequest which was used to partially fund the Ethel Swinburne Centre. This building on Burwood Road has since made way for the Advanced Technologies Centre.

In recognition that Ethel Swinburne was Swinburne's most enduring and generous benefactor, the Ethel Swinburne Society has been established. This prestigious society will consist of alumni and friends of the university who advise that they have left funds to Swinburne in their will. There is no minimum bequest amount.

By notifying the Alumni and Development Office that you have mentioned Swinburne in your will, you will automatically become a member of the Ethel Swinburne Society and be invited to special events at the university. This will also allow the university's senior leadership to say *thank you* during your lifetime.

The memory of Ethel Swinburne will live on!







Swinburne – the new vision

Swinburne University of Technology was established as a university in 1992 – a proud step in a history that began with our establishment as a technical institute in 1908.

Throughout our 100 year history, Swinburne has been committed to innovative education, strong industry engagement and social inclusion.

In recent years, Swinburne has progressed to become one of the world's leading universities, ranking as one of the top 400 universities in the world, as assessed by the Academic Ranking of World Universities, and one of the top 100 in the world in physics.

Our emphasis is on high-quality, engaged teaching and research in science, technology and innovation – teaching and research that makes a difference in the lives of individuals and contributes to national economic and social objectives.

We work to advance and build our research through partnerships with industry, our communities and other universities within Australia and internationally, to achieve outcomes that are directly relevant to industry and society.

At Swinburne, quality is never confused with elitism. We work to provide educational opportunities to capable students, regardless of their backgrounds.

Both as an early leader in international education and an early adopter of online education, Swinburne is expanding the educational opportunities available to a new generation of learners.

Swinburne is excited about the coming decade. Throughout our history, we have demonstrated our ability to be innovative and responsive to change.

We will continue to work with our stakeholders and communities to be a leader in delivering world class education in science, technology and innovation.

Vice-Chancellor's message

Swinburne owes its existence to the vision and generosity of education advocates George and Ethel Swinburne.

From its humble beginnings as a local provider of technical education, Swinburne has grown to become one of Australia's foremost teaching and research universities, and we continue to strive to be a leader in delivering world class education in science, technology and innovation.

Your support of this great institution is sought by way of you remembering Swinburne in your will. Such bequests provide a source of support for the university that is not subject to fluctuations in the economy.

You can specify that your bequest be used to establish an endowment fund for a scholarship, a prize, to fund a specific area of research, or any other purpose you feel is important. A gift that transforms our organisation or one of our programs is a wonderful philanthropic expression.

A number of alumni have already signalled that they have mentioned Swinburne in their wills – including Kath Watson, Kate Brown and Hans Pierrot, whose stories are included in this booklet.


I encourage others who have included Swinburne in their wills to let our Alumni and Development Office know. This will allow us to show you our appreciation during your lifetime.

Please join me in supporting our Swinburne.

A handwritten signature in white ink, appearing to read 'Linda Kristjanson', with a horizontal line above the first few letters.

Professor Linda Kristjanson
VICE-CHANCELLOR AND PRESIDENT





HELPING DISADVANTAGED
WOMEN ACHIEVE
INDEPENDENCE

Kath

Kathleen Watson AM

When Swinburne first advertised the Kath Watson Scholarship for female students suffering highly challenging obstacles to education, it was swamped by 58 applications.

The first of the scholarships was awarded to single mum and forensic science and psychology student Ms Karuna Santosa. Her studies were interrupted by violence.

Ms Kath Watson AM – a former pioneering high school principal and long-serving Swinburne University of Technology Council member – said she had been moved by the level of real need among local disadvantaged women, despite Australia's high standard of living.

"In the average, well-to-do Australian community, we have a high standard of living and it's a pretty good place to live. But lots of women and girls are still disadvantaged, especially if they come from broken homes and lack family support," Ms Watson said.

Women who prioritised child-rearing suffered financial obstacles to study even in happy, well-supported marriages, let alone if there was a marriage break-down, she said.

"If the mother wants to go back to university, especially if she's bright and wants to go onto higher levels like a PhD or a master's and then go back to a professional career, she's restricted simply because she's a woman even though she might be happily married."

But sometimes women suffer even greater challenges to their health, and that of their children, and study aspirations become critical to their financial independence.

"If they are not happily married and there's a break-down there could be violence as there is in many of these cases of disadvantaged women and the children are at risk. All sorts of things happen and they need more money."

However to make more money, they need to get better qualifications, she said. Ms Watson said she was so concerned by the level of need shown in the number of applications for the inaugural Kath Watson Scholarship, that she has funded another.

Being accepted as "worthwhile human beings" was essential to helping disadvantaged women – including refugee and Koori women – rebuild their lives, she said. Ms Watson said Swinburne's caring, supportive atmosphere made this possible and it is hoped that her bequest would fund the scholarship on an ongoing basis. She said more funding was needed.

"We have to keep them going."



Kate Brown

When retired Swinburne Councillor Kate Brown and her husband were reviewing their wills and considering ways to “give back” for a fortunate life, they decided to make individual bequests.

“I always wanted to do a PhD but didn’t get around to it,” Mrs Brown said. “I made choices to meet the demands of my family and business life rather than complete further study. But at least I had the choice.

“I know of women who have not had that choice, and I thought that I could help through providing the means to support the completion of a higher degree when a woman with potential was considering dropping out.”

Mrs Brown’s bequest is for scholarships for promising female Master’s and PhD students who face financial difficulties in completing those qualifications. The scholarships are not to be tied to any particular discipline.

“I have a belief that education is one of the most powerful forces. Whether it’s creating opportunities or changing the way things are, education is a wonderful source of new initiative. It helps people change their lives and change society,” she said.

“Therefore, if you want to make a difference, supporting educational opportunities (through a bequest) is a very powerful way of doing it.”

Mrs Brown said her long and intimate experience of seeing how Swinburne operated – from the perspective of being a student, University Council member and now volunteer tutor – had informed her choice to direct her bequest to the University.

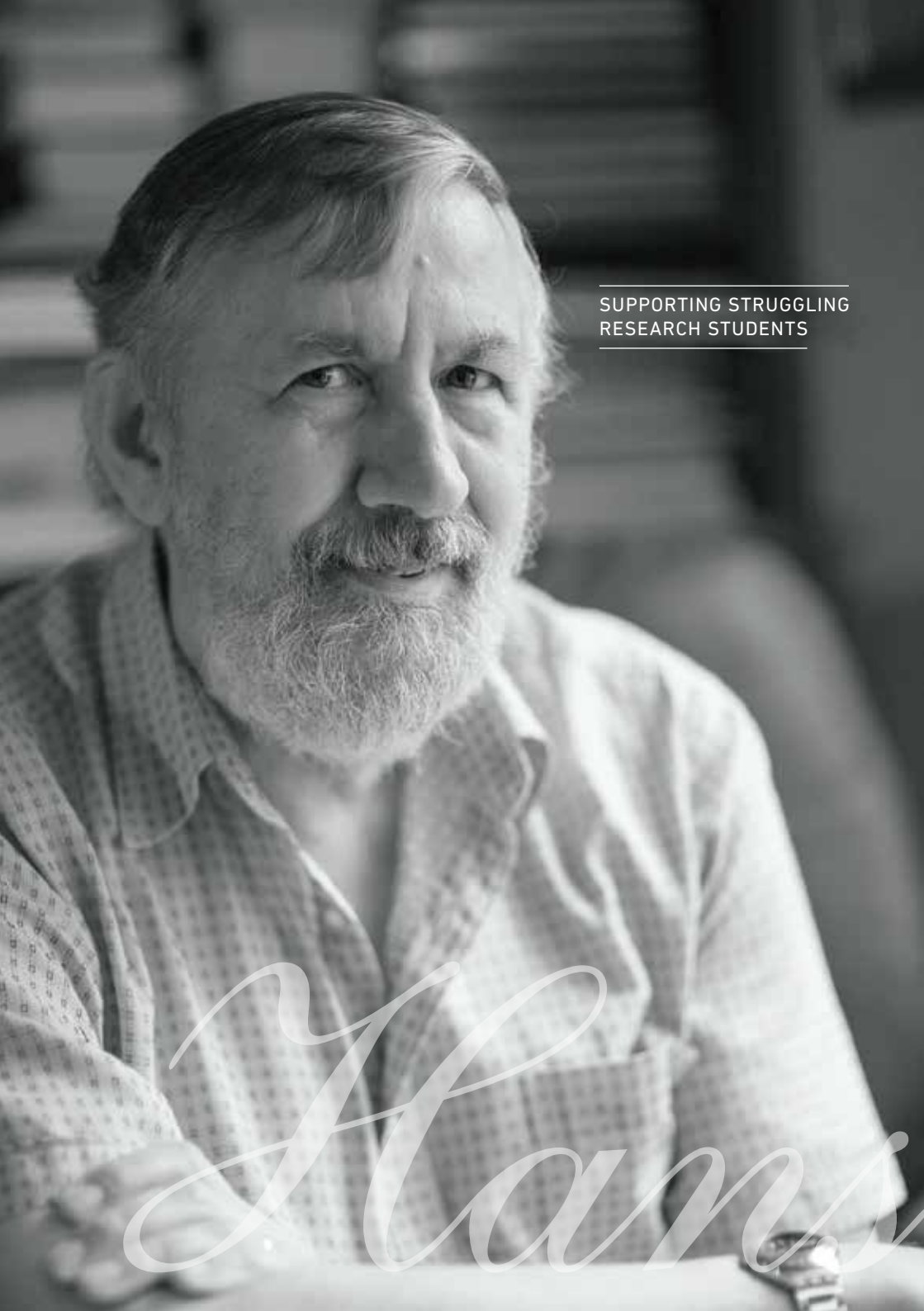
“From my own postgrad experience and time on Council, I knew Swinburne programs were strongly integrated with industry and commerce, and that influenced my decision,” she said.





GIVING BACK FOR
'A FORTUNATE LIFE'

Fortite



SUPPORTING STRUGGLING
RESEARCH STUDENTS

Hans

Hans Pierrot

Postgraduate students are regarded as the workhorses of Australian university research, with many working on solutions to the country's most urgent problems.

Financial support for these early career researchers has improved over the past four years, but many of these problem-solvers and part-time university tutors still undertake further study without a scholarship.

Masters graduate Hans Pierrot was once one of these researchers within Swinburne's computer science department. The experience has inspired him to make a generous bequest aimed at supporting struggling research students in the field.

Mr Pierrot worked as a computer systems specialist for Mobil Oil for many years and did masters level research in artificial intelligence and data classification, which was co-published with Swinburne's Professor Tim Hendtlass in an academic journal.

Having seen some of his fellow students who didn't have much money go hungry at times, Mr Pierrot said he believes in supporting research students.

In making a bequest, Mr Pierrot said he was heavily influenced by his family's strong education ethos. They migrated to Australia from the Netherlands in the 1950s.

"My parents put us four through as much education as we could handle," he said.

"They always tried to tell us education was important and my subsequent experience proves that.

"I am a great believer in education and getting people educated; that's really the basis of my idea of what this bequest is all about."



Everyone should make a will

By making a will you ensure that your estate is distributed as you wish, rather than your estate being distributed to unintended beneficiaries, pursuant to intestacy rules.

A will also enables you to leave a lasting legacy towards a special cause which you support.

Why not consider combining a cash gift with a bequest?

You may well decide that it would be highly tax effective for you, when deciding to make a gift to Swinburne, to make a cash gift during your lifetime and combine it with a bequest in your will.

The benefit to you is that you obtain a tax deduction for the gift made during your lifetime, thereby preserving part of your assets for you and your estate. Just as importantly, it also allows you to see the impact of your generosity, during your lifetime.

The benefit to Swinburne is that it can put the cash component of your gift to work immediately, while awaiting receipt of your bequest at some time in the future.

For more information, or to arrange a confidential appointment, contact the Alumni and Development Office on 9214 8705 or email alumni@swin.edu.au

How do I leave a bequest to Swinburne?

We encourage you to consult a solicitor in making your will to discuss how best to pass on your assets in accordance with your wishes and for the benefit of Swinburne.

There are a number of ways you can make a bequest to Swinburne in your will. They are:

- A gift of a percentage of your residuary estate
- A gift of a lump sum
- A gift of real estate
- A gift of personal estate such as shares, securities and paintings etc.

Your gift may be made to Swinburne for its general uses or, if you prefer you may make a bequest to a particular faculty, department, area of research or initiative which may be special to you.

Where can I direct my bequest?

Funds are always needed for a wide range of programs. These include:

- Undergraduate scholarships and prizes
- Postgraduate scholarships and fellowships
- Research in specific areas such as Alzheimer's Disease, Parkinson's Disease, Ageing, Autism, Sustainability, Engineering, Astronomy, Leadership and others
- Teaching support
- The Library
- Construction, maintenance or renovation of buildings and facilities

Suggested wording for gifts in your will

The following clauses may be of assistance to you or your solicitor in the preparation of your will:

For a general bequest

'I give and bequeath free of all duties and taxes or other deductions to Swinburne University of Technology of John Street Hawthorn in the State of Victoria or its successors in law (University) (the sum of \$ or % of my residuary estate) for such general purposes as the Vice-Chancellor for the time being shall in his or her sole discretion decide and I declare that the official receipt of the University shall be an absolute discharge to my Trustee for such bequest.'

For a specific bequest to one of the University's programs

'I give to Swinburne University of Technology (University) free of all duties and taxes or other deductions (the sum of \$ or% of my residuary estate) (hereinafter called 'my Gift') and it is my express wish without imposing any obligation, condition or restriction upon the University that my Gift be applied for the general purposes of(name of the program) provided that in the event that such program no longer exists or is no longer in operation I direct that the Gift shall be applied in as similar a way as possible to my wish as the Vice-Chancellor of the University shall decide in his or her sole and unfettered discretion and I declare that the official receipt of the University shall be an absolute discharge to my Trustee for my Gift.'



Swinburne University of Technology
Alumni and Development Office
03 9214 8705
alumni@swin.edu.au